

3 February 2015
Lausanne, Switzerland



2014 World Rowing Television and Video Streaming Report

We would like to take this opportunity to update you on the results that we have achieved as a result of the new television strategy introduced in 2010. World Rowing Productions ("WRP"), an entity formed between FISA and Quattro Media, a specialised sports programming production and distribution agency based in Munich, Germany, has provided us with a well-structured and dedicated professional resource that has helped us to develop and realise a forward-thinking broadcast strategy as well as deliver improved and more consistent host TV productions. In turn, this has led to a far greater amount of coverage and a wider distribution of our programming.

This report is intended to provide you with detailed information about the amount of television coverage that our sport now attracts – globally and (where applicable) in individual countries.

In this letter and attachments (where applicable) you will find:

- A description of how we have improved the quality of our host TV productions (point 1 below).
- A status report on the number of World Rowing Broadcast Right holders, as well as those with which we are currently under discussion (point 2).
- An explanation of the World Rowing "News Service" and our relationships with international news agencies which have increased the amount of coverage significantly – especially in countries where we do not have any Rights holder agreements (point 3).
- A summary of Global-total TV coverage information from our major events from 2009 – 2014 (point 5).
- For those NFs in countries in which there is already a World Rowing Broadcast Rights holder, we provide (as an attachment) a summary of the World/European Rowing TV coverage that you will have received in your country in 2014 (point 6).
- A summary by country of the www.worldrowing.com Live Streaming and Video on Demand results (point 7).
- How we use FISA's YouTube channel (point 8).

From this information and the graphs, you will be able to see the progress that has been made in recent years. Today, television is a very competitive environment and we can be proud of what has been achieved for our sport. We hope that all this will be helpful to you in any discussions that you might have with your own media partners and existing or potential sponsors.

1. Host TV productions for our World/European Rowing events

Minimum Television production guidelines with camera plans and technology have been agreed for our World Rowing Cup, European and World Rowing Championship regattas. Also, new standard requirements include advanced super slow-motion and cable camera equipment as well as a fully-stabilised master side-camera operating at a 90 degree angle to the leading crews.

Since 2010, World Rowing Production's Executive Producer has been involved in the host TV production of every World and European Rowing regatta. One basic objective that we strive to achieve is that the racing commentators can always understand and interpret what is happening in the race (whether they are on site or in a studio) so they can explain this to their own audiences, thus help them to better understand our sport.

The goal is to present and promote rowing in a consistent way, wherever one of our televised regattas is held.

2. World Rowing Broadcast Right holders

Our long-term sales strategy needed to take into account the fast and multiple changes that are constantly affecting broadcast media. In particular, we needed to stay relevant for many different audiences and viewing habits. This means that we must provide a greater range of content (not just the live signal) as well as an improved level and quality of service which gives each Broadcast Partner what it needs, and in a timely manner.

We are very fortunate that rowing continues to be a long-standing and respected Olympic sport, meaning that in many countries rowing remains interesting – even essential - for their main, free-to-air, public service networks.

In particular, we have made significant progress in determining how the European Broadcasting Union ("EBU") - which represents all of Europe's major public-service TV channels - distributes our television footage throughout Europe. In particular we are now able to sell our rights to non-EBU members in those countries whose EBU Member is not prepared to become a rights-holder.

a) Within Europe, World Rowing's existing Rights holders are:

Bulgaria	BTV	Czech Republic	CT
Denmark	TV2	Estonia	ERR
France	FTV and L'Equipe 21	Germany	ARD/ZDF
Great Britain	BBC	Greece	NERIT
Italy	RAI	Netherlands	NOS
Norway	NRK	Pan-Europe	Eurosport
Poland	TVP	Romania	TVR
Russia	RTR	Slovenia	RTVSLO
Switzerland	SRG/SSR	Ukraine	XSport

And, through the EBU, we are now in discussion with channels in Austria, Croatia, Finland, Kazakhstan and Lithuania.

b) Outside Europe, World Rowing Productions sells and distributes World Rowing's Broadcast Rights. Our existing rights-holders are:

Australia	FOX Sports
Brazil	GloboSat
Canada	Rogers SportsNet (in cooperation with CBC)
China	CCTV
New Zealand	SKY NZ

Discussions are on-going in the USA, Latin America and Asia.

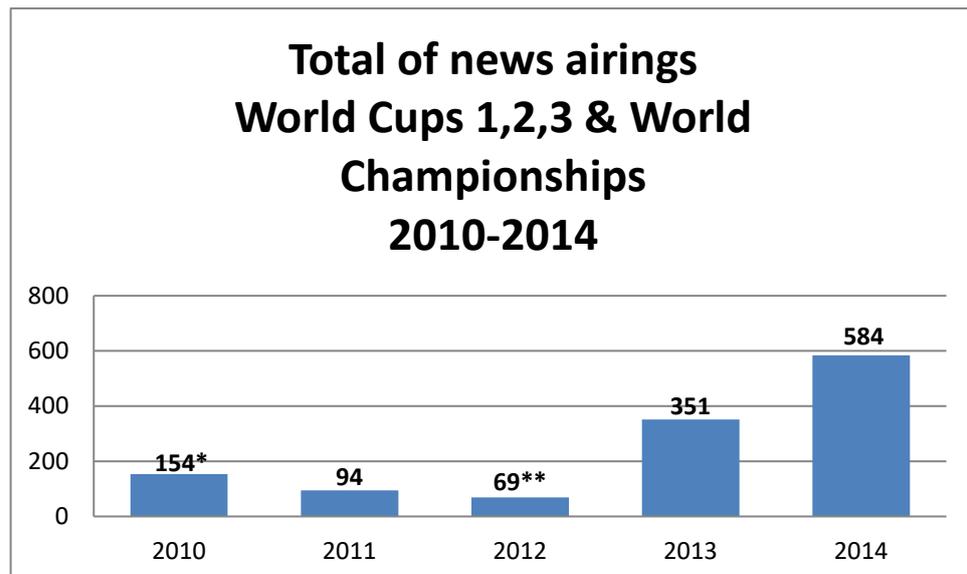
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3. The World Rowing “News Service”

For all televised World/European Rowing regattas since 2010, World Rowing Productions has provided a unique (and free of charge) News Service to all its rights-holders as well as to non-rights-holders. This 30 minute summary featuring the best races of the day includes the start, race-action, the finish, the awards as well as mother-tongue and English language interviews, and it is always available within three hours after the last televised race. Also, on request from right-holders that cannot send their own interview crew to the event, mother-tongue interviews are filmed featuring their national rowers.

This service has significantly increased the amount of television coverage of rowing – especially in those countries in which there is no rights-holder agreement. A secondary benefit is that our News Service has increased interest in countries in which there is no rights-holder, leading to new and full, multi-year rights-holder agreements.

The feedback that we have received from the EBU, as well as many of our international rights-holders, is that due to this service (and in fact our overall Broadcast Strategy) FISA is now leading the way in sport-productions and we are setting the standard for other international federations to follow.



News Service was added to the ERCH in 2013 (80 news airings) and 2014 (105 news airings) but are not shown on this chart.

*Missing data from the World Rowing Cup 3

**Olympic year, no WRCH

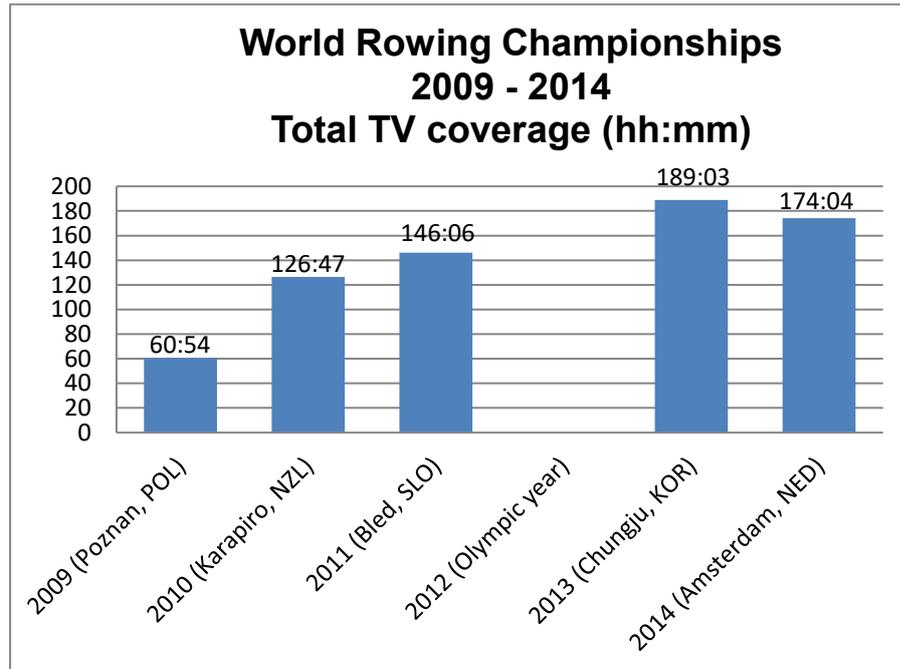
4. International News agencies

After each day of televised racing, World Rowing Productions provides a short three minute News summary, free of charge, to a group of international sports video news agencies which include the EBU, SNTV and Omnisport (In negotiation with Reuters and Enex). Through these agencies, rowing video-headlines can now reach almost all parts of the world via the Internet, traditional television, PDAs and mobile phones.

5. Total TV coverage from our major events 2009 to 2014

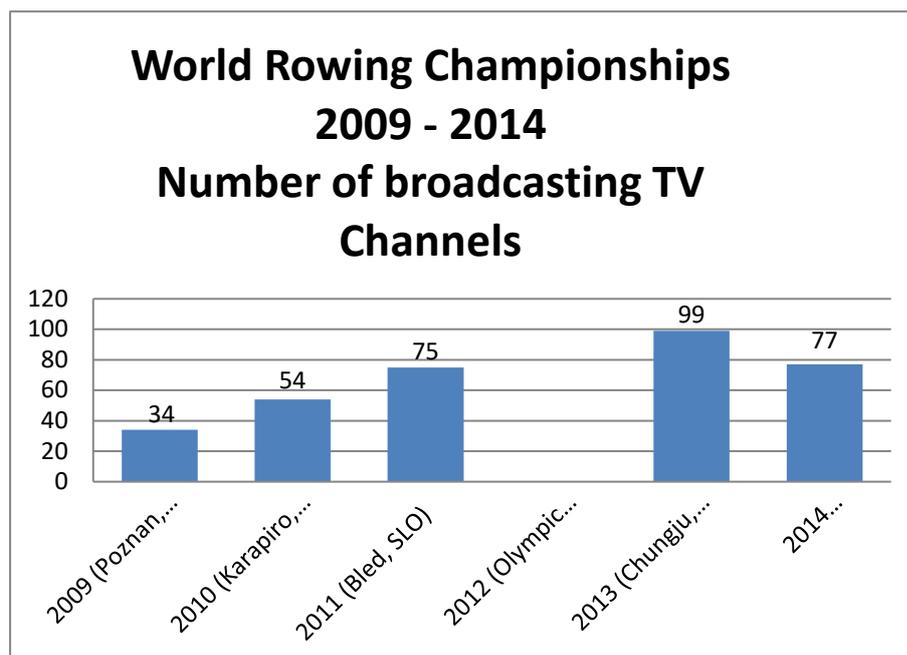
The following information - which covers the World and European Rowing Championships and the World Rowing Cup series from 2009 to 2014 - has been sourced from the individual broadcasters and compiled by the EBU and Quattro Media.

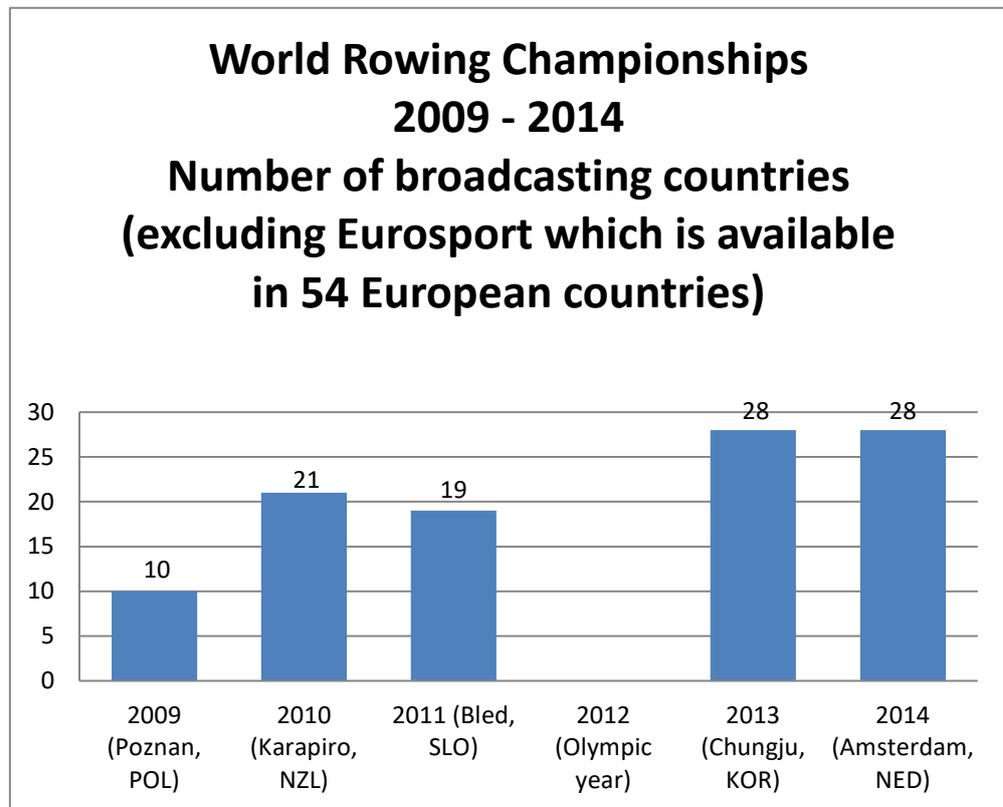
a. World Rowing Championships



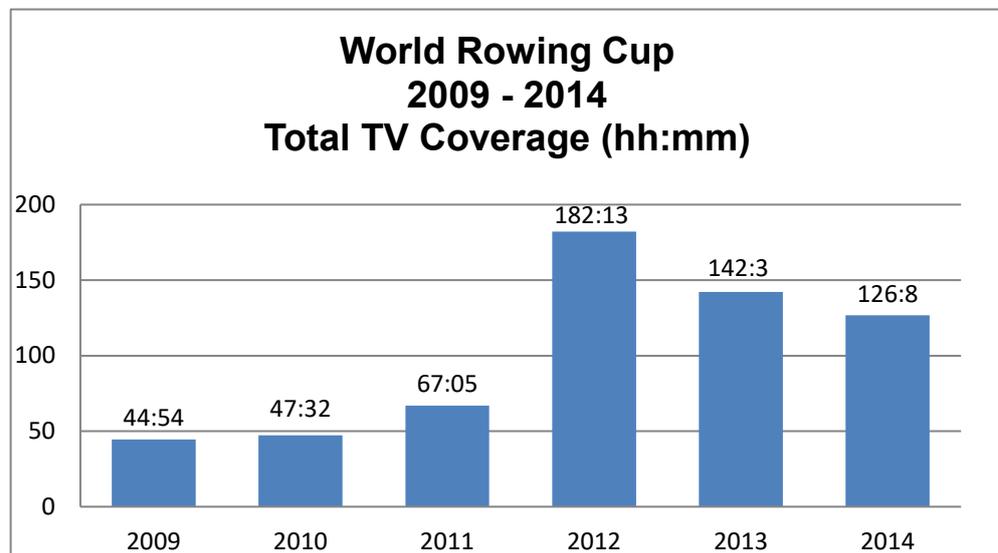
Comment

Because the 2013 World Championships took place in Asia, the broadcast signal was available in Europe much sooner and so more broadcast time was possible. Also, more Asian channels covered rowing than would normally be the case.



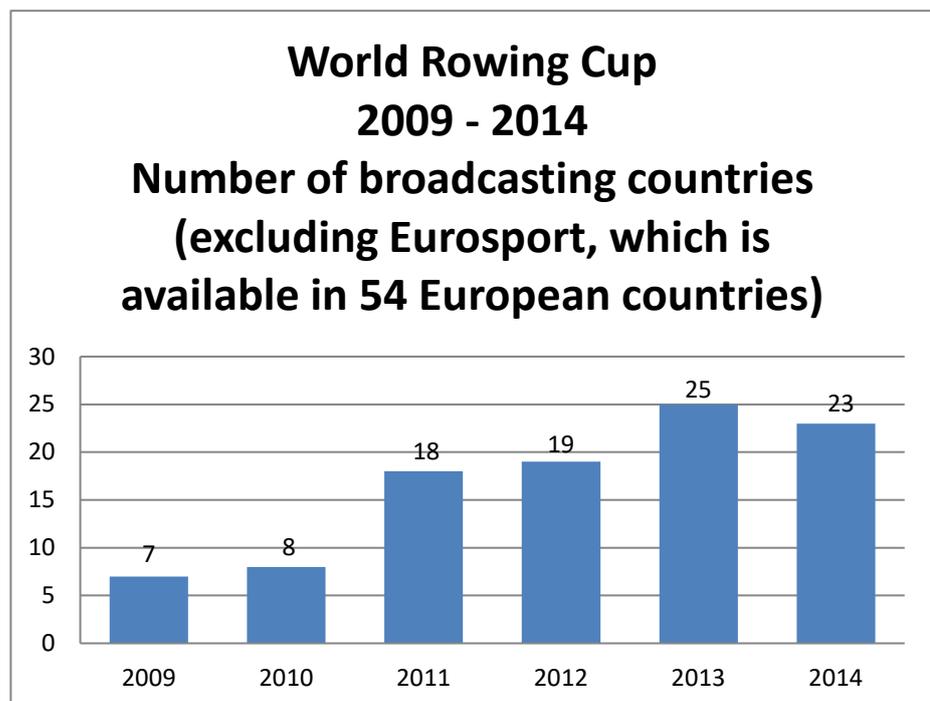
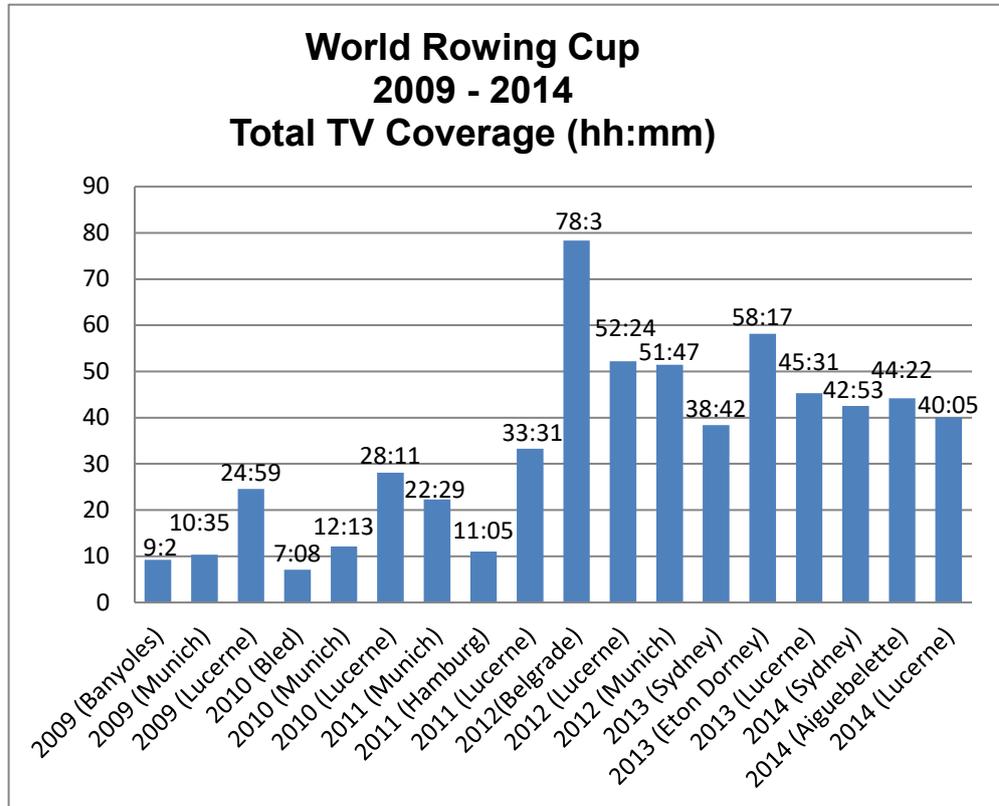


b. **World Rowing Cups**

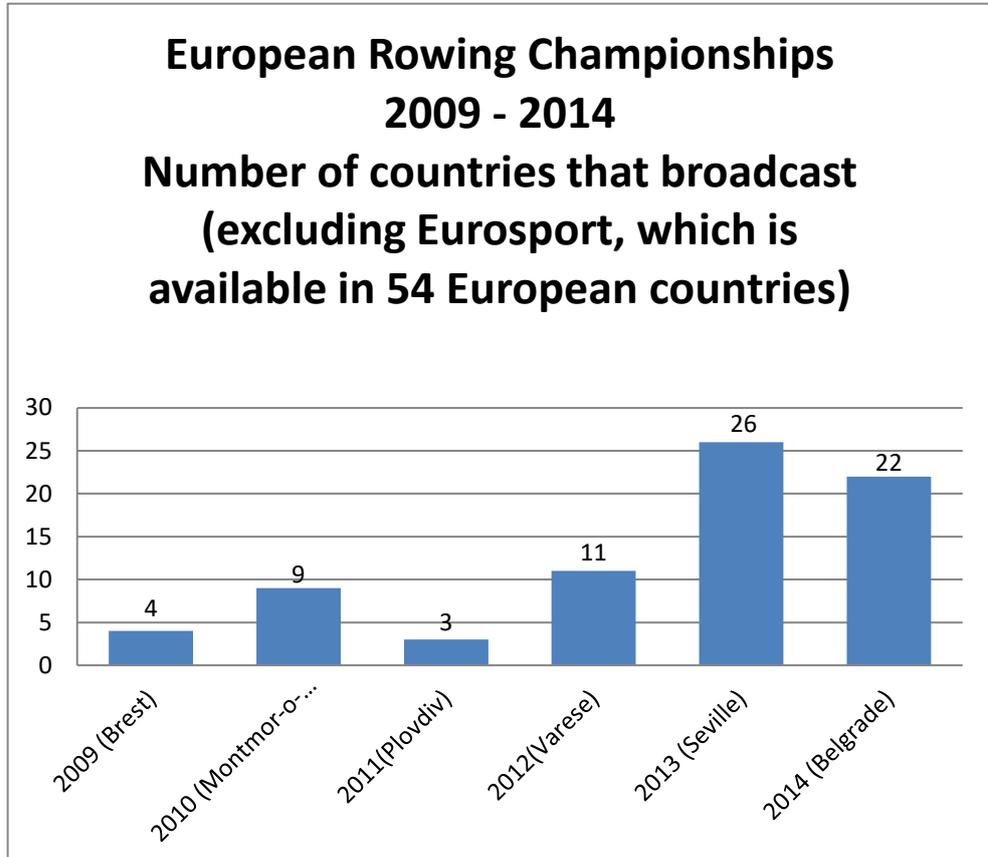
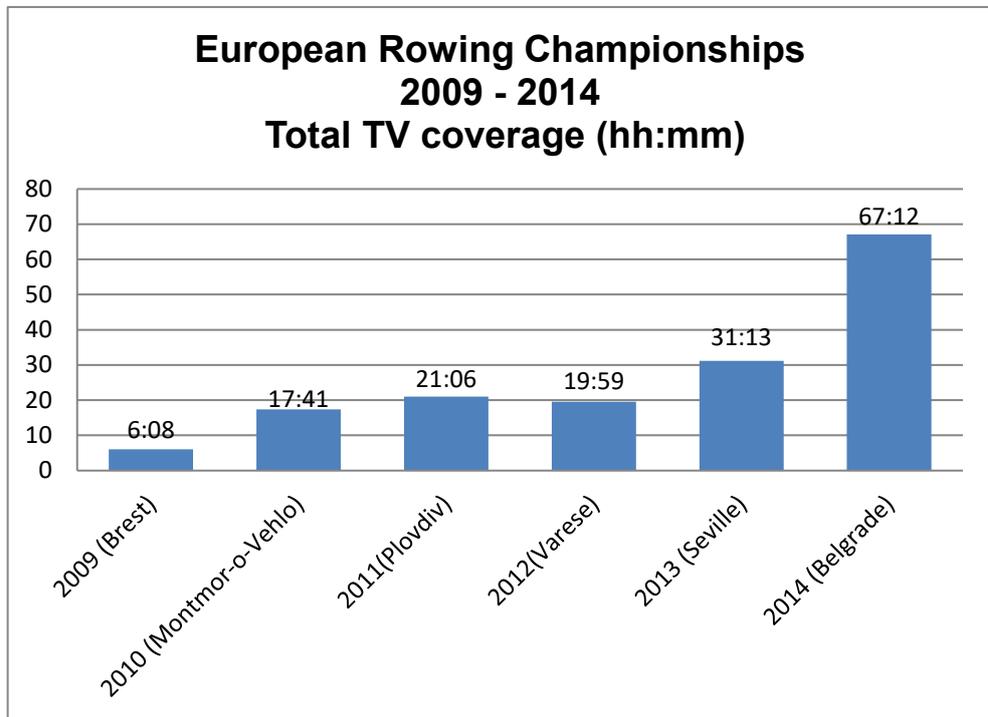


Comment:

TV coverage in 2012 reached an extreme high peak because it was the pre-London 2012 Olympic Games season. It was also the last year in which all three World Cup regattas were staged in Europe. In 2013 & 2014, the first regatta was staged in Australia, which resulted in fewer countries participating. This, compounded by the inconvenient time-zone for European programme scheduling, affected TV coverage in Europe. Even so, it can still be seen (above and below) that a much higher base was established in 2013 and 2014 than had been the case for 2009 – 2011.



c. **European Rowing Championships**



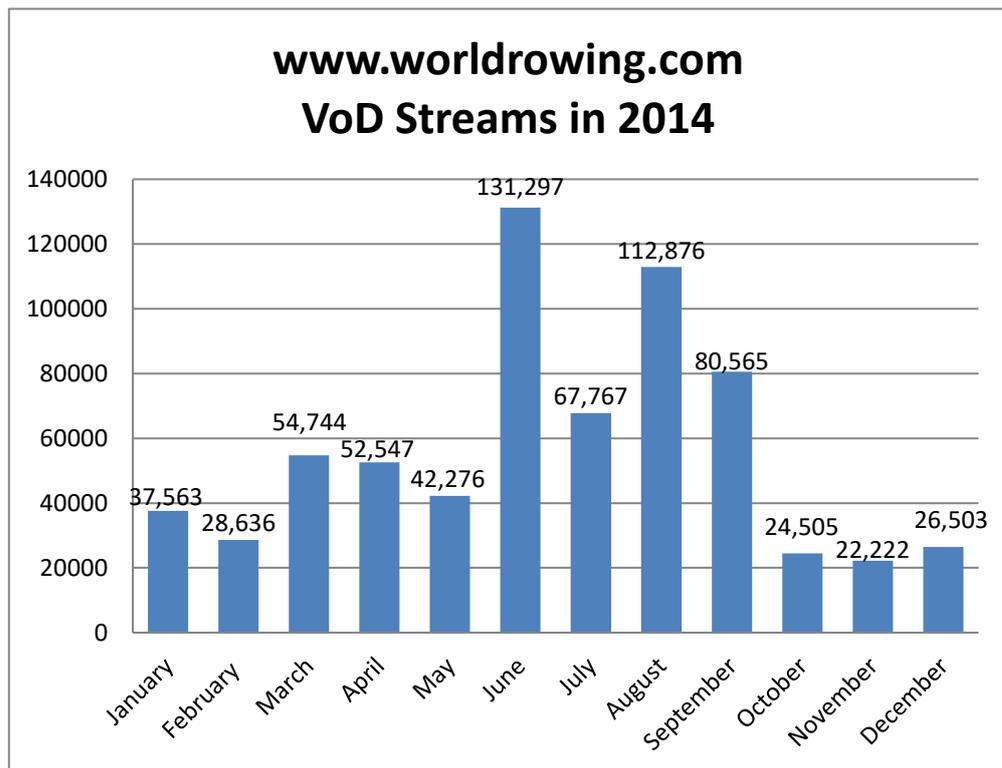
6. Countries with a World Rowing Broadcast Rights-holder

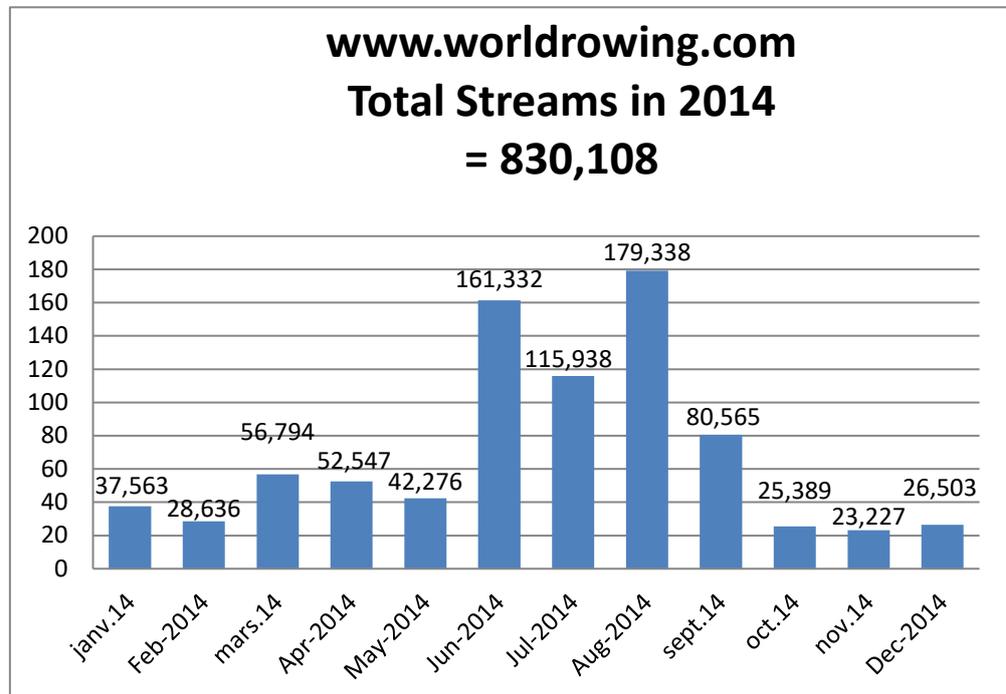
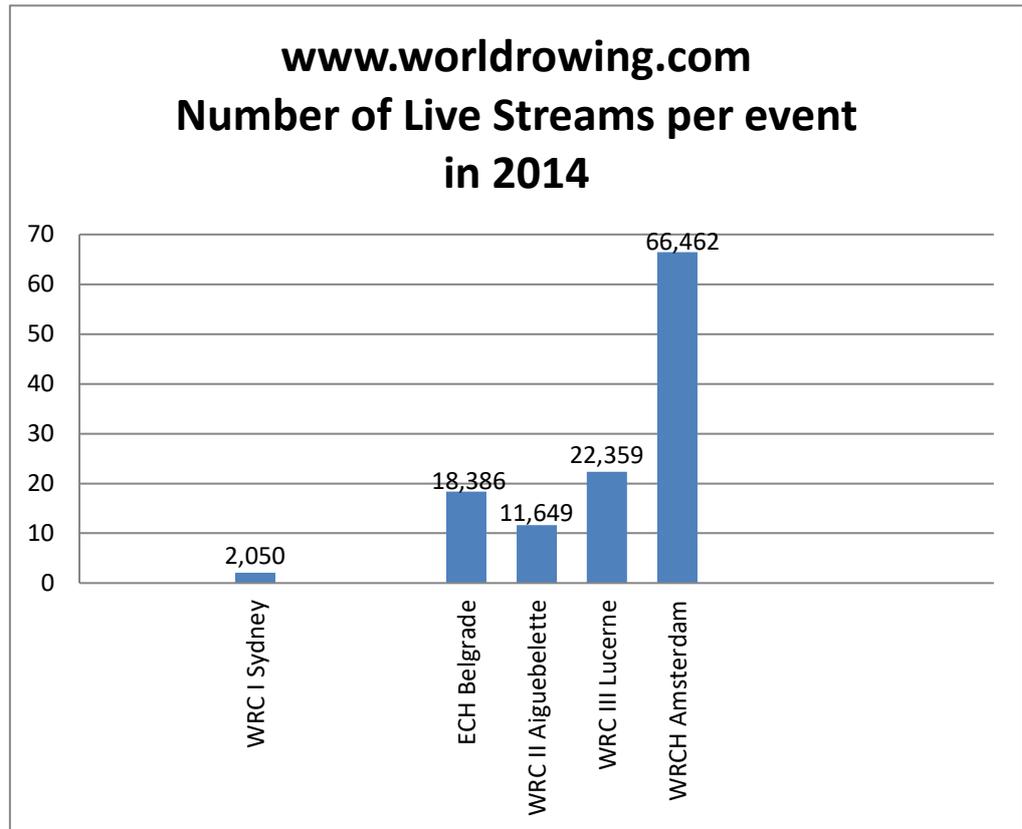
For those NFs in countries in which there was a contracted World Rowing Broadcast Rights holder in 2014 (see point 2 above), a summary of the TV coverage statistics that have been received for the World/European Rowing events in 2014 is attached.

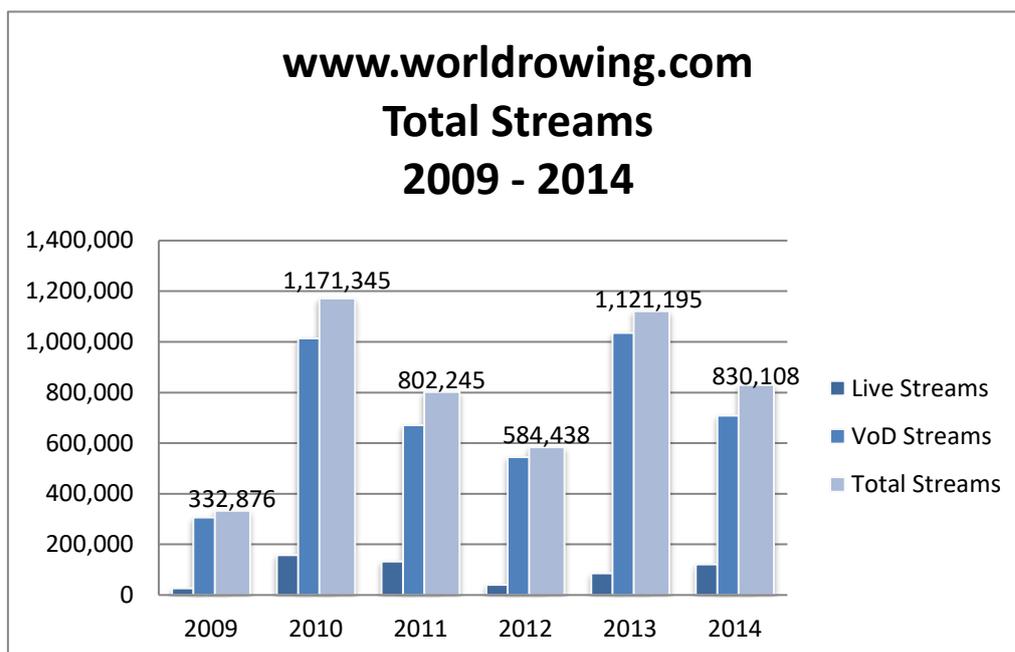
7. Live Streaming and Video-on-Demand (VoD) on www.worldrowing.com

In 2014, between World Rowing Cup I in Sydney and the European Championships in Belgrade, World Rowing launched a new and considerably upgraded website. All televised races can be seen on the website just about everywhere in the world (with the exception of New Zealand where there is a 24 hour embargo). We have a team of commentators that travel to each regatta and provide expert live racing commentary from the regatta. This live-streaming is a particularly useful service for those markets (such as the USA) where we do not presently have a rights-holder television channel.

Post-live, the same videos remain available on-demand and at no cost. And, of course, please note that streaming figures peak at event times.







2014 Video Streaming summary

- Viewers in 167 countries watched World Rowing TV on Video-On-Demand in 2014
- Around 50% of video impressions (354,342) were from the following seven countries.

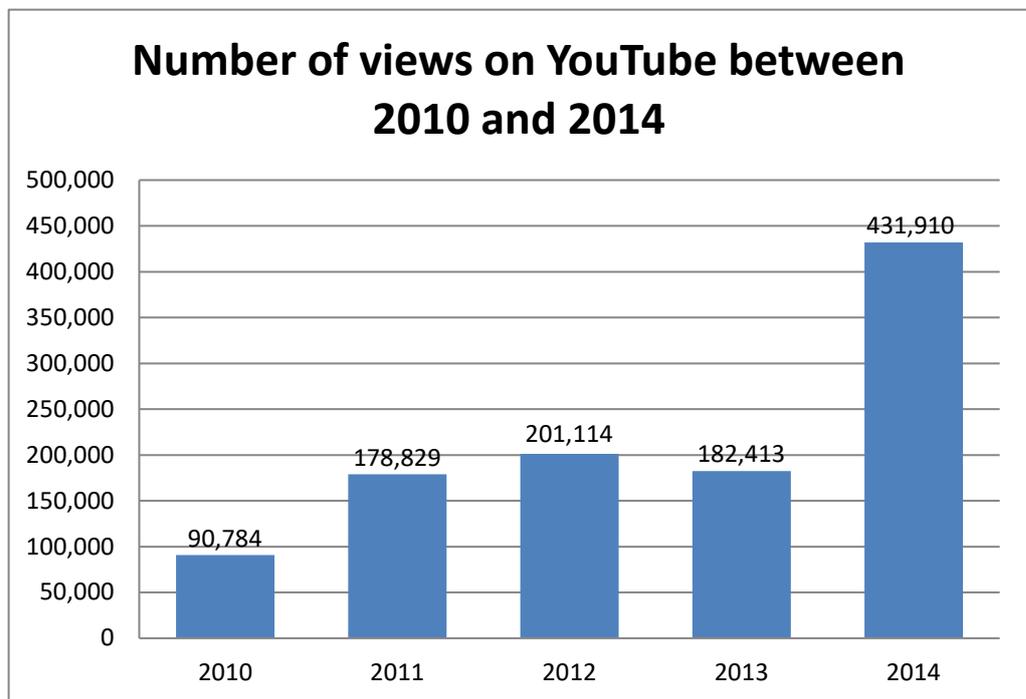
COUNTRY	VIDEO IMPRESSIONS	%
United States	101,125	14.84%
United Kingdom	64,359	9.44%
Germany	51,173	7.51%
France	48,220	7.08%
Netherlands	33,864	4.97%
Australia	30,989	4.55%
Canada	24,612	3.61%

The United States accounts for nearly 15% of total video impressions on www.worldrowing.com. This is the only means to view the racing as there is no rights-holding broadcaster there at the moment.

8. YouTube

YouTube is the famous video content channel with a worldwide reach but our rights-protected racing footage cannot be shown on it. However, the "WorldRowingFISA" channel was created on YouTube (<https://www.youtube.com/user/WorldRowingFISA>) and it is constantly updated with our own athlete interviews and profiles as well as interesting and attractive videos about our sport, promotional clips for our events and features to assist training, coaching and so on.

In 2014, over 40 unique videos were posted on World Rowing's YouTube channel, containing a total of 20 hours and 23 minutes of original content. These generated a total of 431 910 views.



9. Conclusion

This information has been provided to you in order to assist your appreciation of how much television coverage our sport is now achieving, and also to help each National Federation in its own search for sponsors. However, please do not make any public announcements about any of the content yet. FISA will be making its own (global) press announcement soon. Thank you for your understanding.

We hope that you have found this information helpful. Now that we have the structure, the necessary partners and the means to provide this information, we plan to report on an annual basis. And if you feel that we should make contact with a television channel in your country then, subject to any existing contractual obligations to which we might already be committed, we will be very pleased to do so.

Sincerely,



Jean-Christophe Rolland
President



Matt Smith
Executive Director